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Wealthtech Weekly

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By Rachel Witkowski
Tech reporter

Mental health profoundly impacts how people handle their money. Yet not many advisors ask clients whether there's a neurodivergent household member, said advisors at Citi, Corient and others.

Fortunately, there are new tech tools that help streamline workflows for neurodivergent clients, such as automated meeting reminders for those who have ADHD.

Advisors' tips can be found here, and much more at Financial Planning.

On a bittersweet note, this is my last week at Financial Planning. Our highly experienced reporter Rob Burgess will be taking over the tech beat. You can reach him at robert.burgess@arizent.com.

Thanks for reading!

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How high-touch advisors are reaching more clients with special needs

Advisors who specialize in working with neurodivergent clients are finding new technology has helped streamline communication and grow their client bases.

- **What's in a name? A lot, when it comes to humanizing AI**
  Firms such as Carson Group, Morgan Stanley, Morningstar and Merrill are taking vastly different approaches to naming their AI assistants, with some preferring a human name, a male name or simply no human identifier.
- **Advisors are using AI but skipping compliance guardrails**

An industry survey of 200 compliance officers showed that a mere 12% of respondents currently using AI said they also adopted an AI risk management framework; experts said advisory firms need an AI governance plan ASAP.

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